



File Name	Creating a new POI_BUSPROC.doc
Version	8.9
Document Created	11/16/2010
Date Modified	11/16/2010
Last Changed by	ASDS
Status	DRAFT

Creating a new POI

Trigger:

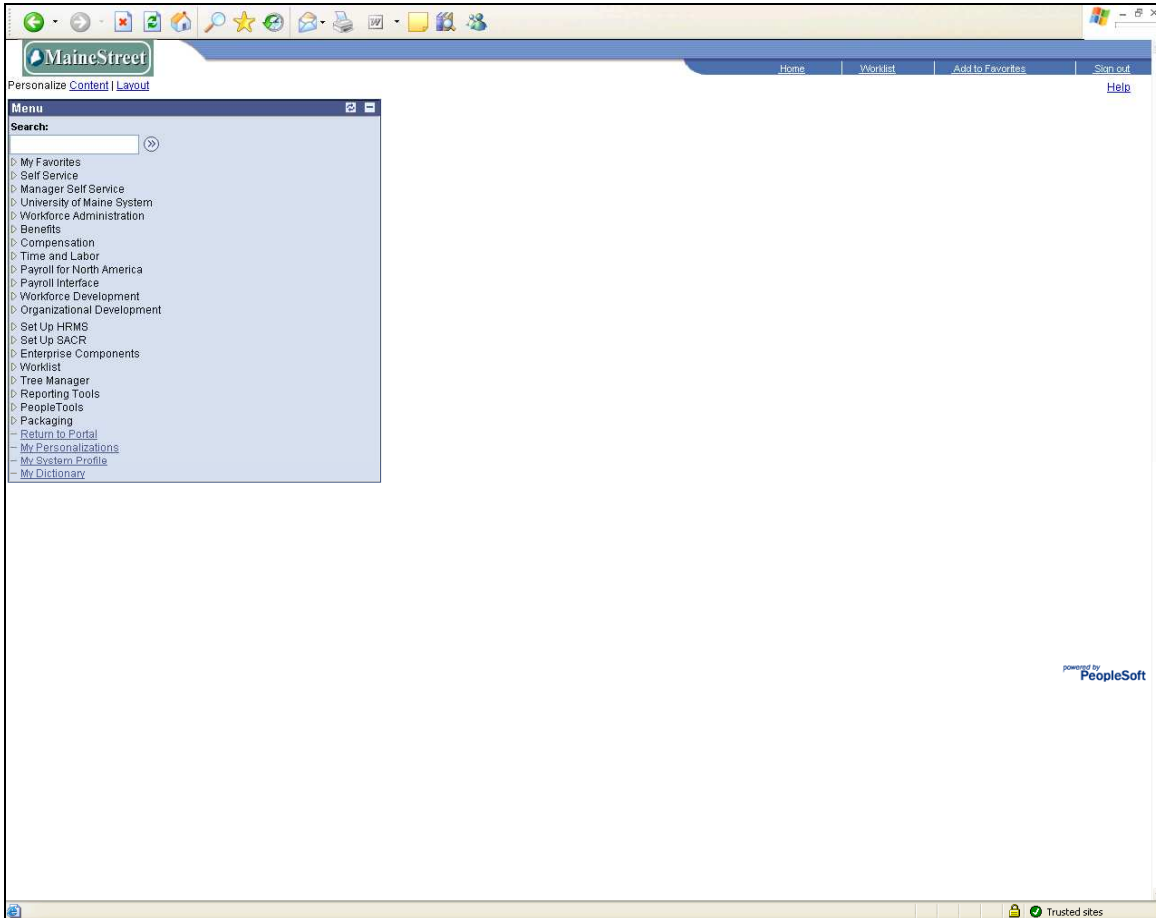
Concept

Create a new POI record

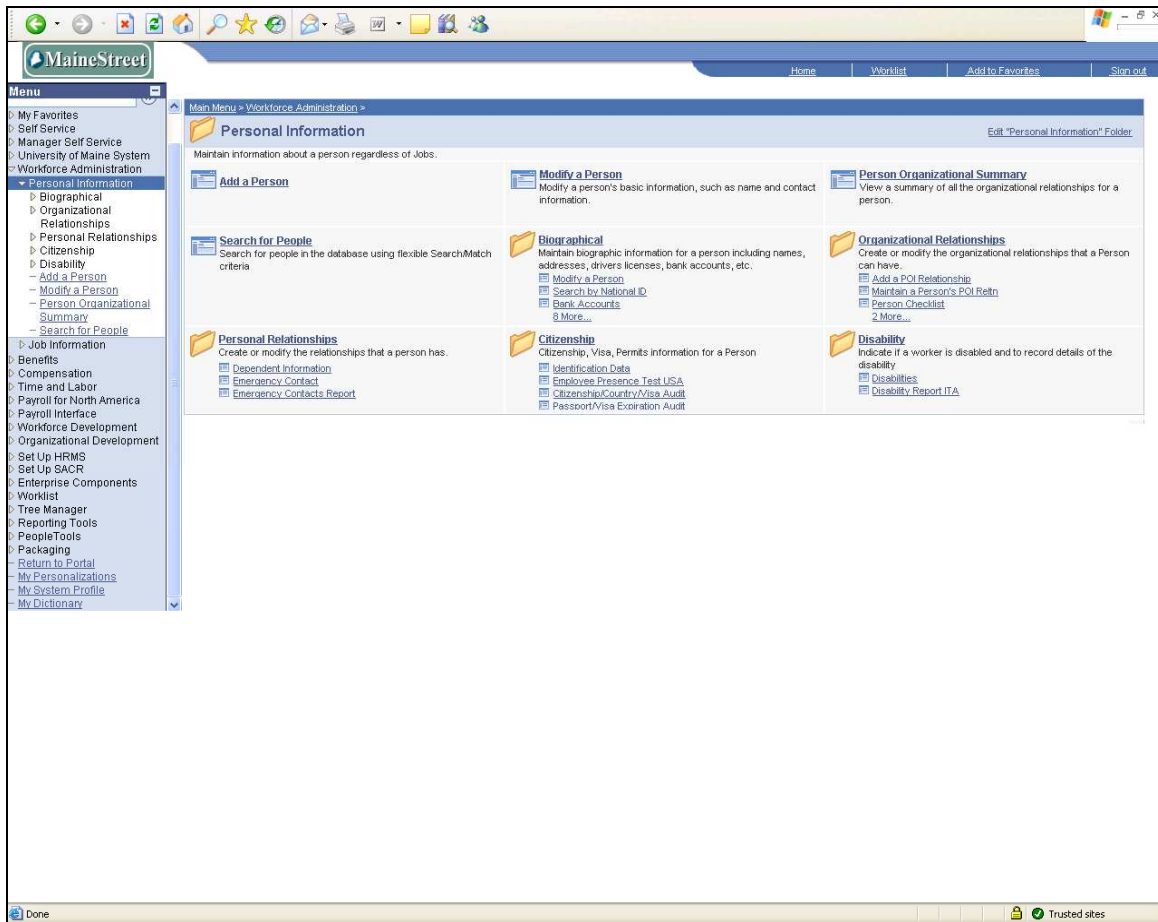
POI (Person of Interest) is a person with an attachment to the University System (Emeritus Faculty, Volunteer, etc) who is not an employee.
This process should be used to create a POI record.

Please refer to: <http://www.maine.edu/pdf/UsingUPK.pdf>

Procedure



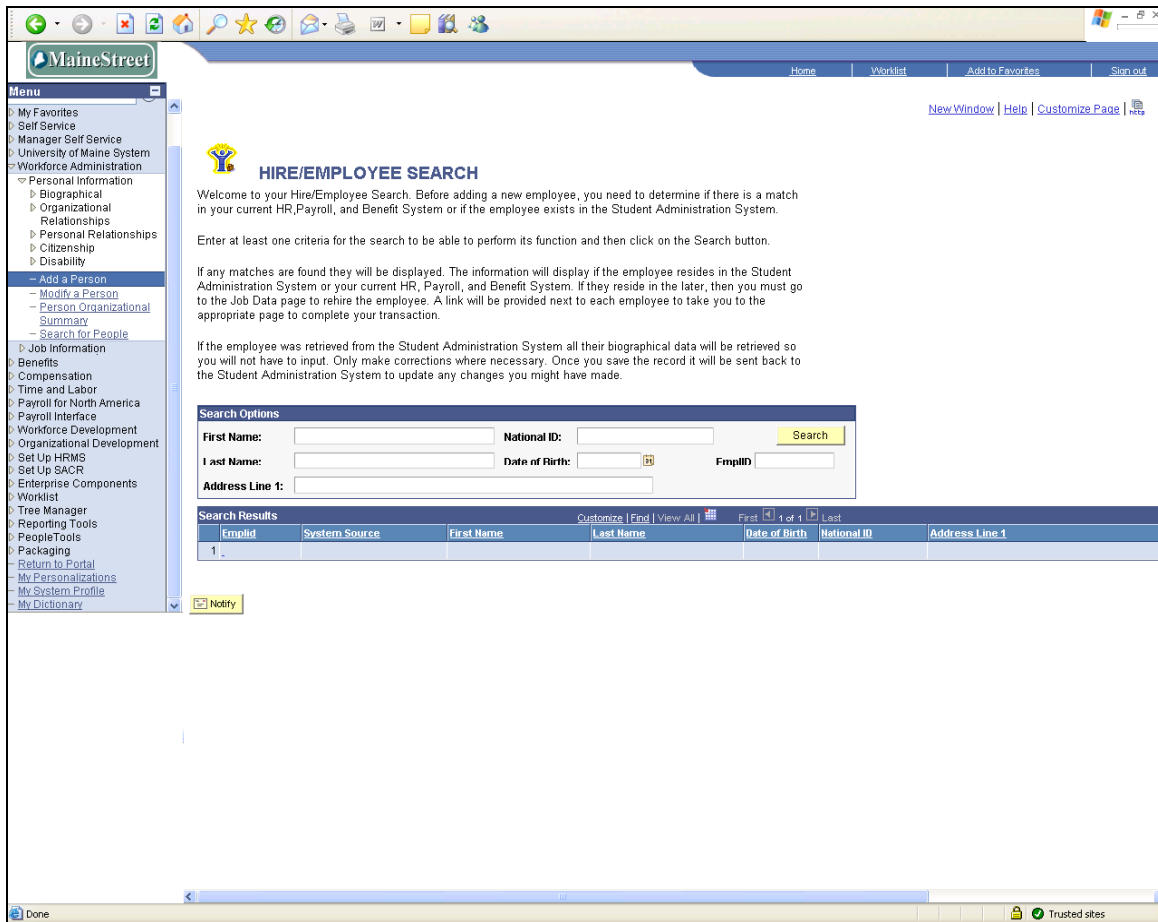
Step	Action
1.	Click the Workforce Administration link. <input type="text" value="Workforce Administration"/>
2.	Click the Personal Information link. <input type="text" value="Personal Information"/>



Step

Action

3. Click the **Add a Person** link.



Step	Action
4.	<p><u>Important Notes about Search Options:</u></p> <ol style="list-style-type: none"> 1) Searching by National ID only is not a safe option. Students are not required to provide this information. It can be useful for verification if other information (name, date of birth) are not unique. 2) Searching by Date of Birth only is a primary search is not a safe option. There are many student records with blank date of birth. 3) Search should include a combination of name (first three letters of first and/or last name) and date of birth. Narrow search with additional information if necessary. 4) Always ask for current and former legal names, date of birth, and home address for verification of search information for Persons of Interest. 5) If you know that the person has a record in the CS Database, try different spellings of the name to search (i.e. Cath or Kath for Katherine, Catherine, Kathy, etc)
5.	

4.

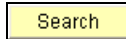
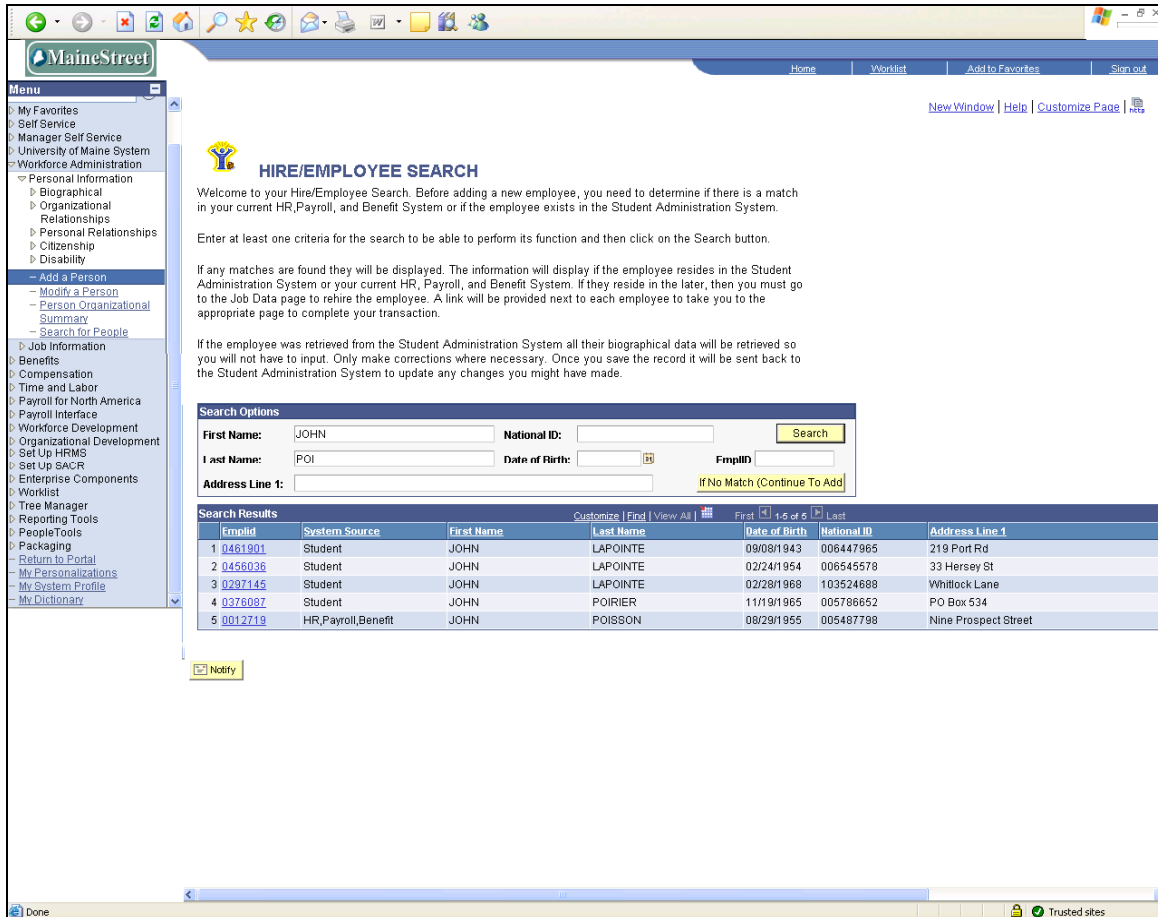
Important Notes about Search Options:

- 1) Searching by National ID only is not a safe option. Students are not required to provide this information. It can be useful for verification if other information (name, date of birth) are not unique.
- 2) Searching by Date of Birth only is a primary search is not a safe option. There are many student records with blank date of birth.
- 3) Search should include a combination of name (first three letters of first and/or last name) and date of birth. Narrow search with additional information if necessary.
- 4) Always ask for current and former legal names, date of birth, and home address for verification of search information for Persons of Interest.
- 5) If you know that the person has a record in the CS Database, try different spellings of the name to search (i.e. Cath or Kath for Katherine, Catherine, Kathy, etc)

5.

Step	Action
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6.	Click the Search button.
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The screenshot shows the 'HIRE/EMPLOYEE SEARCH' page in the HRMS system. The page includes a navigation menu on the left, a search form, and a search results table.

Search Options

First Name: JOHN National ID:

Last Name: POI Date of Birth: EmpID:

Address Line 1:

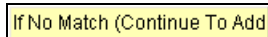
Search Results

EmpID	System Source	First Name	Last Name	Date of Birth	National ID	Address Line 1
1 0481901	Student	JOHN	LAPOINTE	09/08/1943	006447965	219 Port Rd
2 0456036	Student	JOHN	LAPOINTE	02/24/1954	006545578	33 Hersey St
3 0297145	Student	JOHN	LAPOINTE	02/28/1968	103524688	Whitlock Lane
4 0378087	Student	JOHN	POIRIER	11/19/1965	005786652	PO Box 534
5 0012719	HR_Payroll_Benefit	JOHN	POISSON	08/29/1955	005487798	Nine Prospect Street

At the bottom of the search results area, there is a button labeled "If No Match (Continue To Add)".

Step	Action
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7.	Click the If No Match (Continue To Add) button.
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HRMS: Creating a new POI



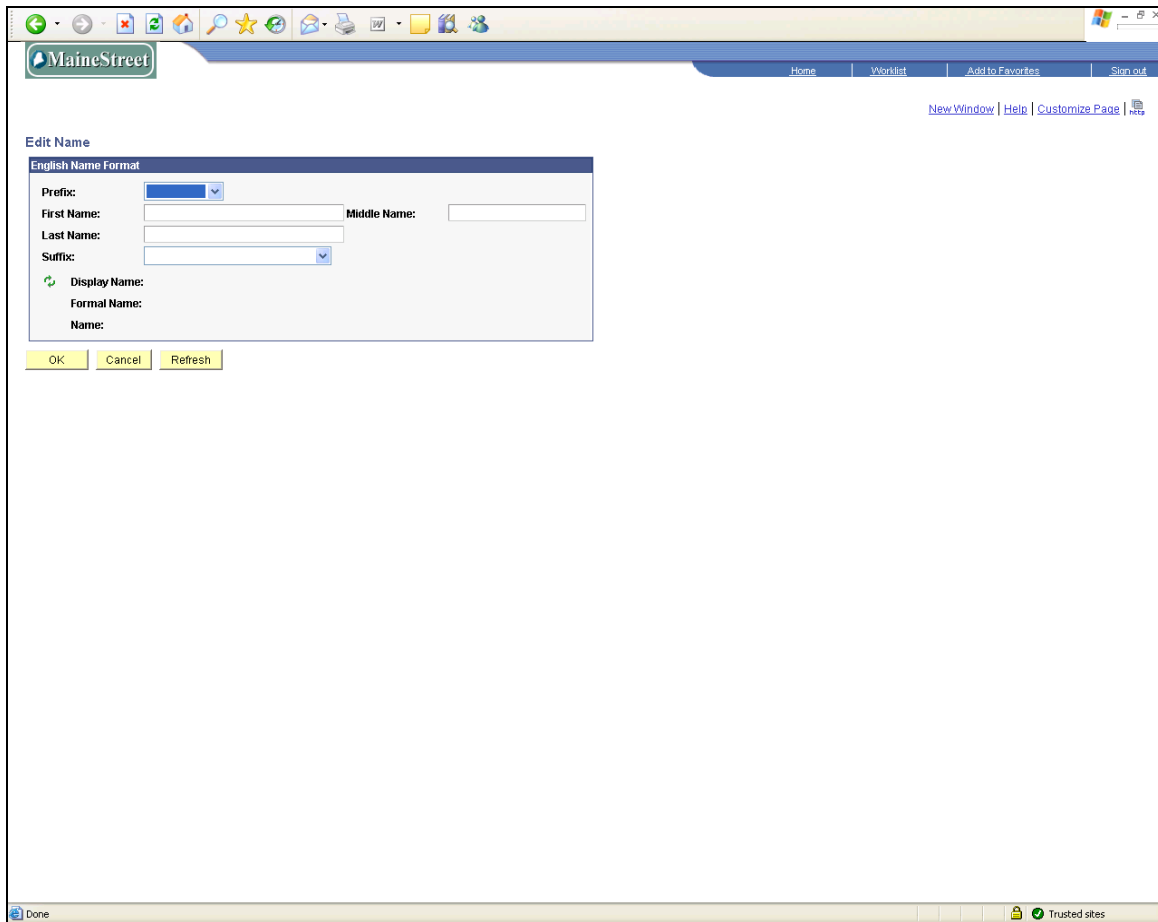
Step	Action
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8.	Enter the desired information into the Effective Date field.
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NOTE: Effective date can be current or earlier. Future dates will not be accepted.

9.	Click the Add Name link.
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[Add Name](#)



Step	Action
10.	<p>NOTE: Prefix, middle name, and suffix may be added, but are not required fields.</p> 
11.	
12.	Enter the desired information into the First Name field.
13.	
14.	Enter the desired information into the Last Name field.
15.	
16.	

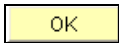
Process Document

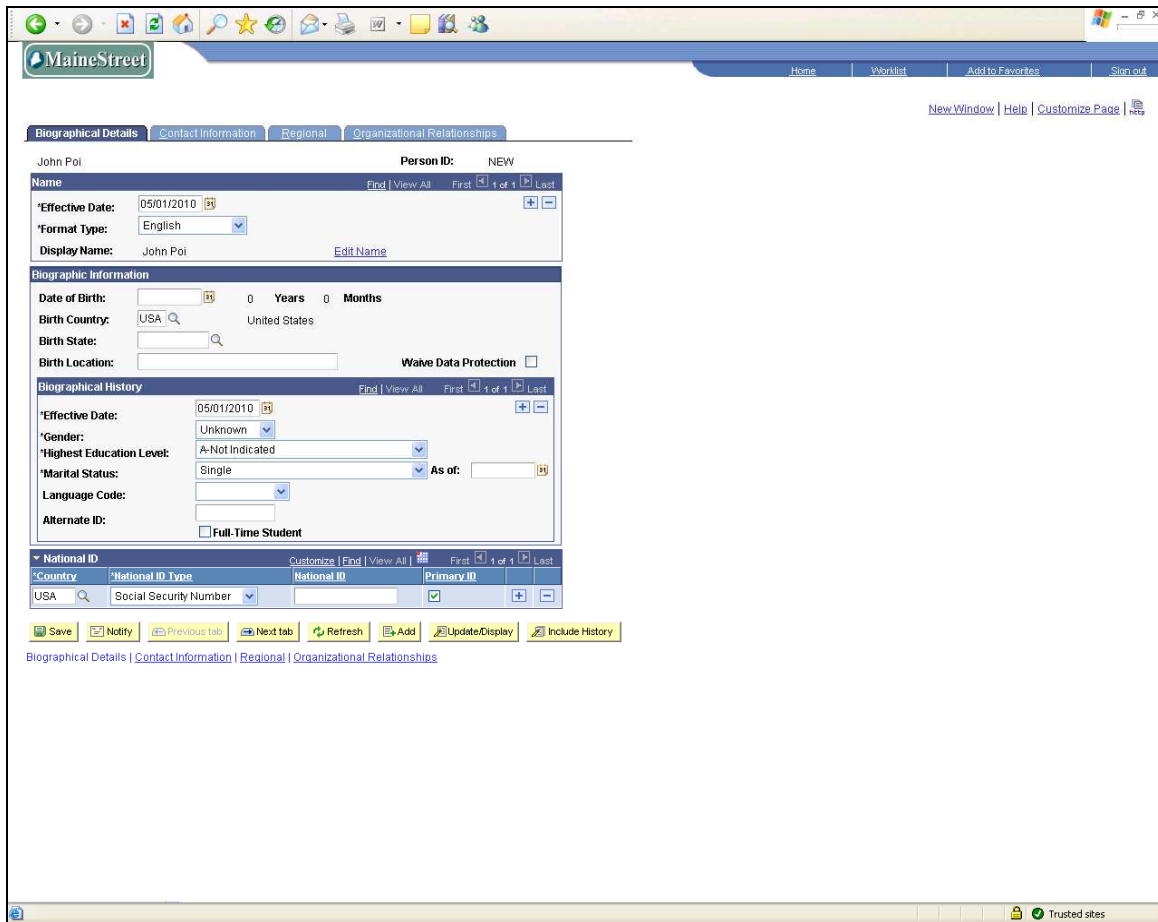
HRMS: Creating a new POI



Step	Action
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17.	Click the OK button.
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The screenshot shows a web browser window displaying the HRMS application. The main content area is titled 'Person ID: NEW' for 'John Poi'. The 'Contact Information' tab is selected in the top navigation bar. The form contains several sections:

- Name:** John Poi, with fields for Effective Date (05/01/2010) and Format Type (English).
- Biographic Information:** Includes Date of Birth (0 Years 0 Months), Birth Country (USA), Birth State, and Birth Location.
- Biographic History:** Includes Effective Date (05/01/2010), Gender (Unknown), Highest Education Level (A-Not Indicated), Marital Status (Single), Language Code, and Alternate ID.
- National ID:** A table with columns for Country (USA), National ID Type, National ID, and Primary ID.

 At the bottom of the form, there are buttons for Save, Notify, Previous tab, Next tab, Refresh, Add, Update/Display, and Include History. The browser's address bar shows 'Trusted sites'.

Step	Action
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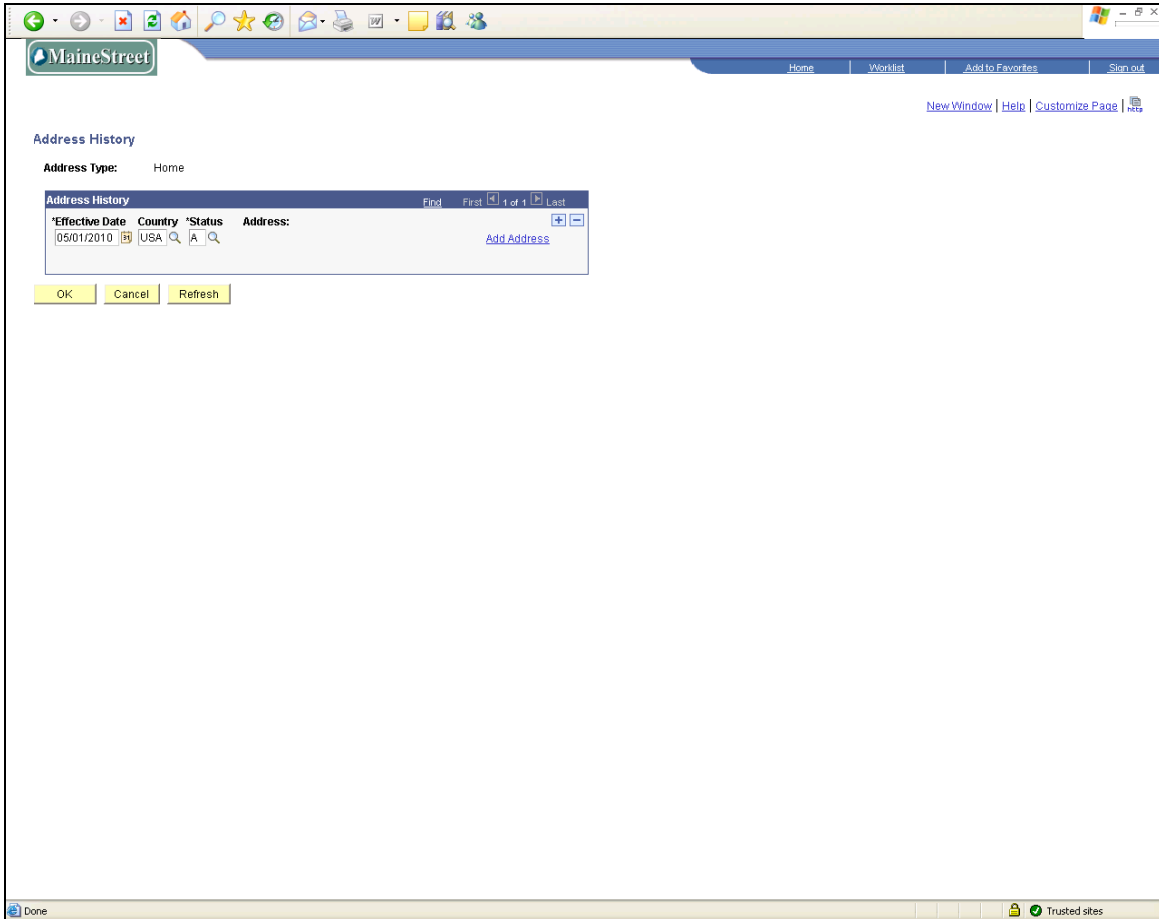
18.	Click the Contact Information tab.
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Contact Information

19.	Click an entry in the Add Address Detail column.
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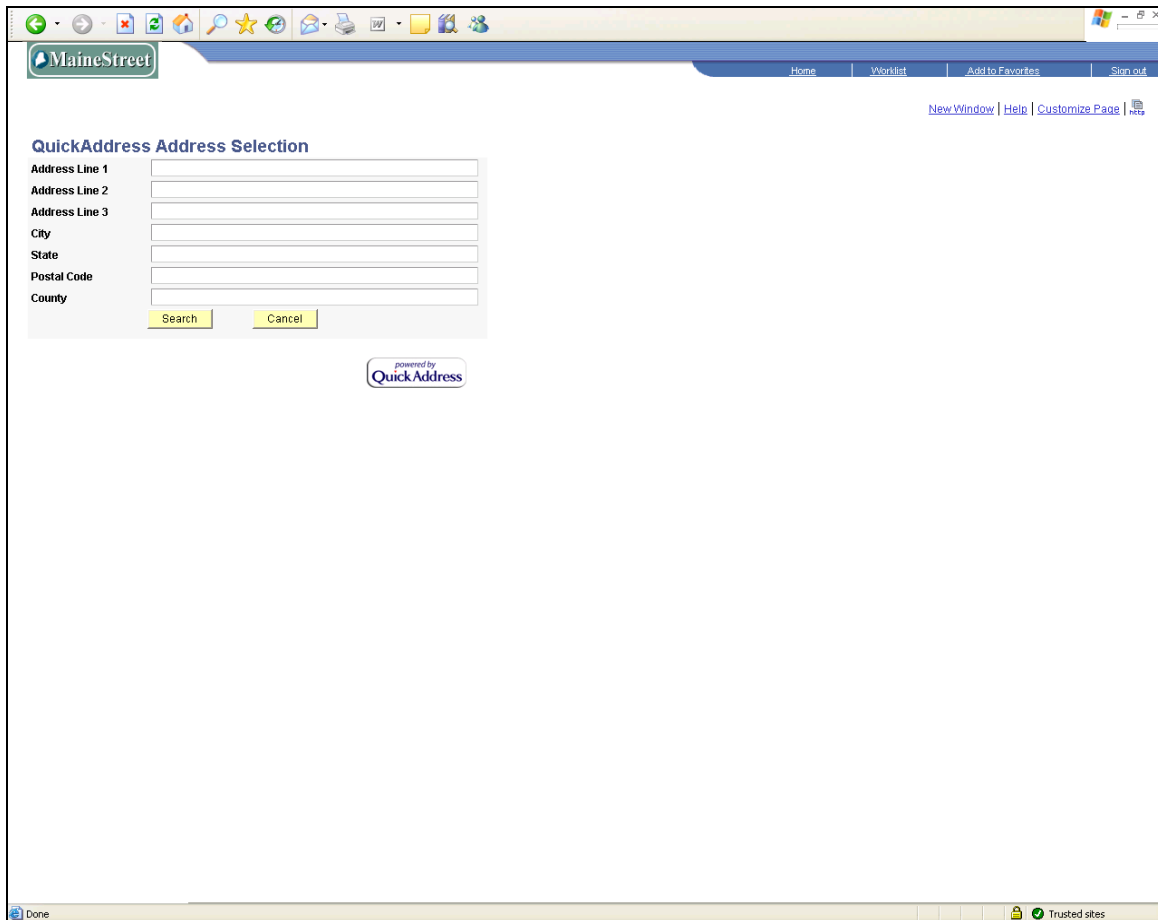
NOTE: At least one address must be added. Home address is required, but if actual home address is not provided, enter campus address information.

Add Address Detail



Step	Action
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- | | |
|-----|---------------------------------------------------------------------------------|
| 20. | Click an entry in the Add Address column.
Add Address |
|-----|---------------------------------------------------------------------------------|

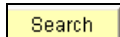


The screenshot shows a web browser window displaying the MaineStreet application. The page title is "QuickAddress Address Selection". The form contains the following fields:

- Address Line 1
- Address Line 2
- Address Line 3
- City
- State
- Postal Code
- County

At the bottom of the form are two buttons: "Search" and "Cancel". Below the form is a logo that says "powered by Quick Address". The browser's address bar shows "Done" and "Trusted sites".

- | Step | Action |
|------|---------------------------------------------------------------------|
| 21. | Enter the desired information into the Address Line 1 field. |
| 22. | Enter the desired information into the Postal Code field. |
| 23. | Click the Search button. |



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Edit Address

Country: United States

Address 1: 111 Main St

Address 2:

Address 3:

Postal: 04401-6309 City: Bangor State: ME Maine

County: Penobscot

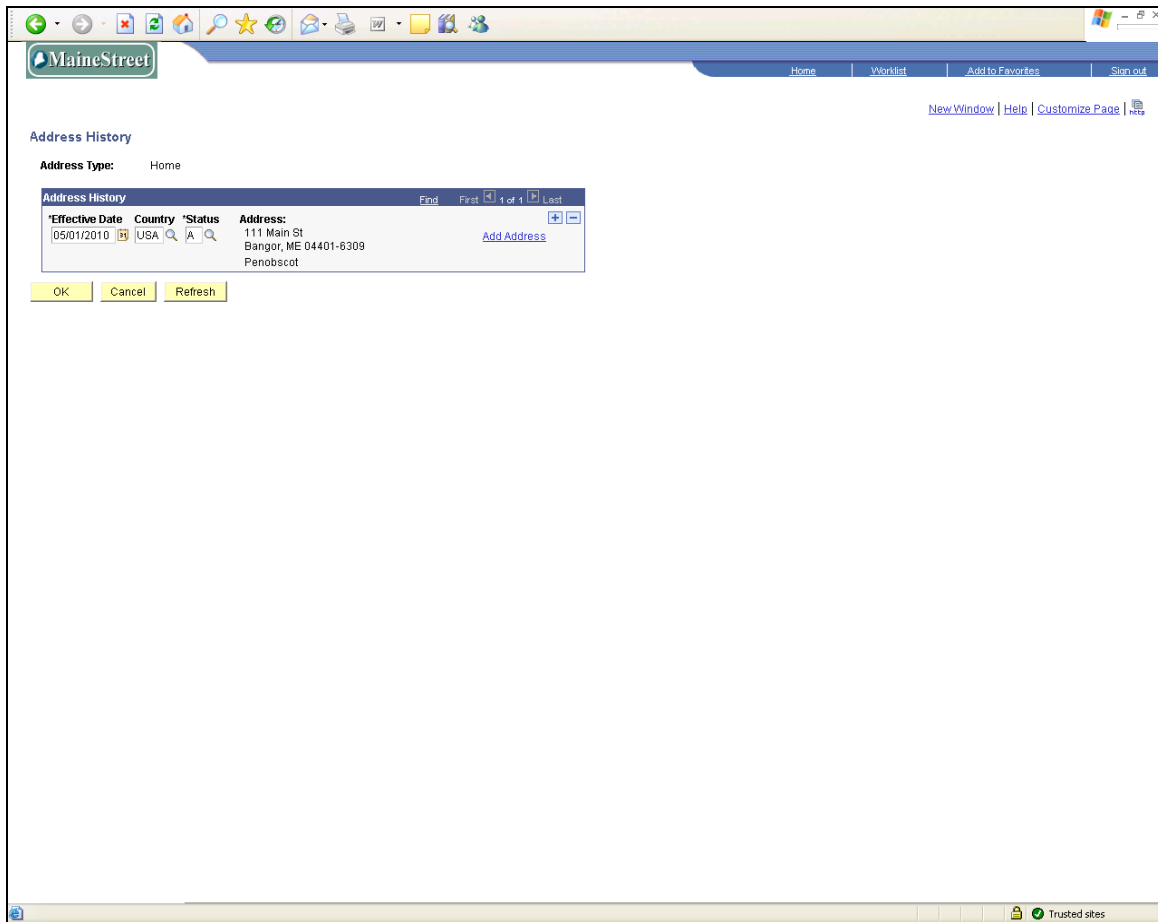
[Override](#)

Instructions

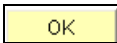
For detailed instructions to edit an address, click on 'Help' in the upper right hand corner of the screen. Click on 'UPK', then 'Edit Address via Employee Self-Service' and then select 'See It'.

If you need additional help, please contact your Human Resources Department.

Step	Action
24.	Click the OK button. <input type="button" value="OK"/>



Step	Action
25.	Click the OK button.



Process Document

HRMS: Creating a new POI

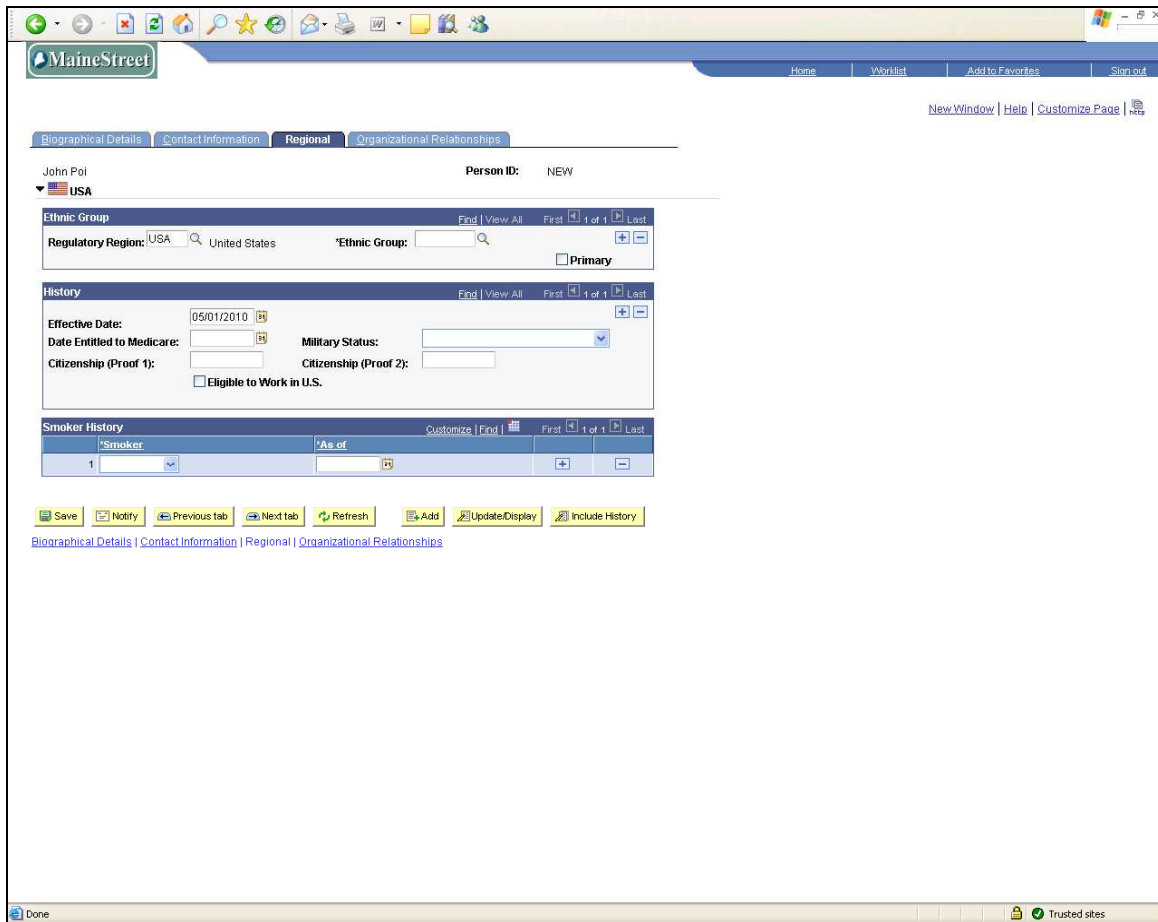


The screenshot shows a web browser window displaying the MaineStreet HRMS interface. The browser's address bar shows the URL. The page has a blue header with the MaineStreet logo and navigation links: Home, Worklist, Add to Favorites, and Sign out. Below the header, there are tabs for Biographical Details, Contact Information (selected), Regional, and Organizational Relationships. The main content area shows details for a new Person ID (NEW) for John Poi. It includes three data tables: Current Addresses, Phone Information, and Email Addresses. The Current Addresses table has one entry: Home, As Of Date: 05/01/2010, Status: A, Address: 111 Main St, Bangor, ME 04401-6309, Penobscot. Below the tables are buttons for Save, Notify, Previous tab, Next tab, Refresh, Add, Update/Display, and Include History. At the bottom of the page, there are links for Biographical Details, Contact Information, Regional, and Organizational Relationships. The browser's status bar at the bottom shows 'Done' and 'Trusted sites'.

Step	Action
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26.	Click the Regional tab.
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John Poi **Person ID:** NEW

USA

Ethnic Group Find | View All | First 1 of 1 | Last

Regulatory Region: USA United States *Ethnic Group: Primary

History Find | View All | First 1 of 1 | Last

Effective Date: 05/01/2010

Date Entitled to Medicare: Military Status:

Citizenship (Proof 1): Citizenship (Proof 2):

Eligible to Work in U.S.

Smoker History Customize | Find | First 1 of 1 | Last

Smoker	As of
1	

Save Notify Previous tab Next tab Refresh Add Update Display Include History

[Biographical Details](#) | [Contact Information](#) | [Regional](#) | [Organizational Relationships](#)

Step	Action
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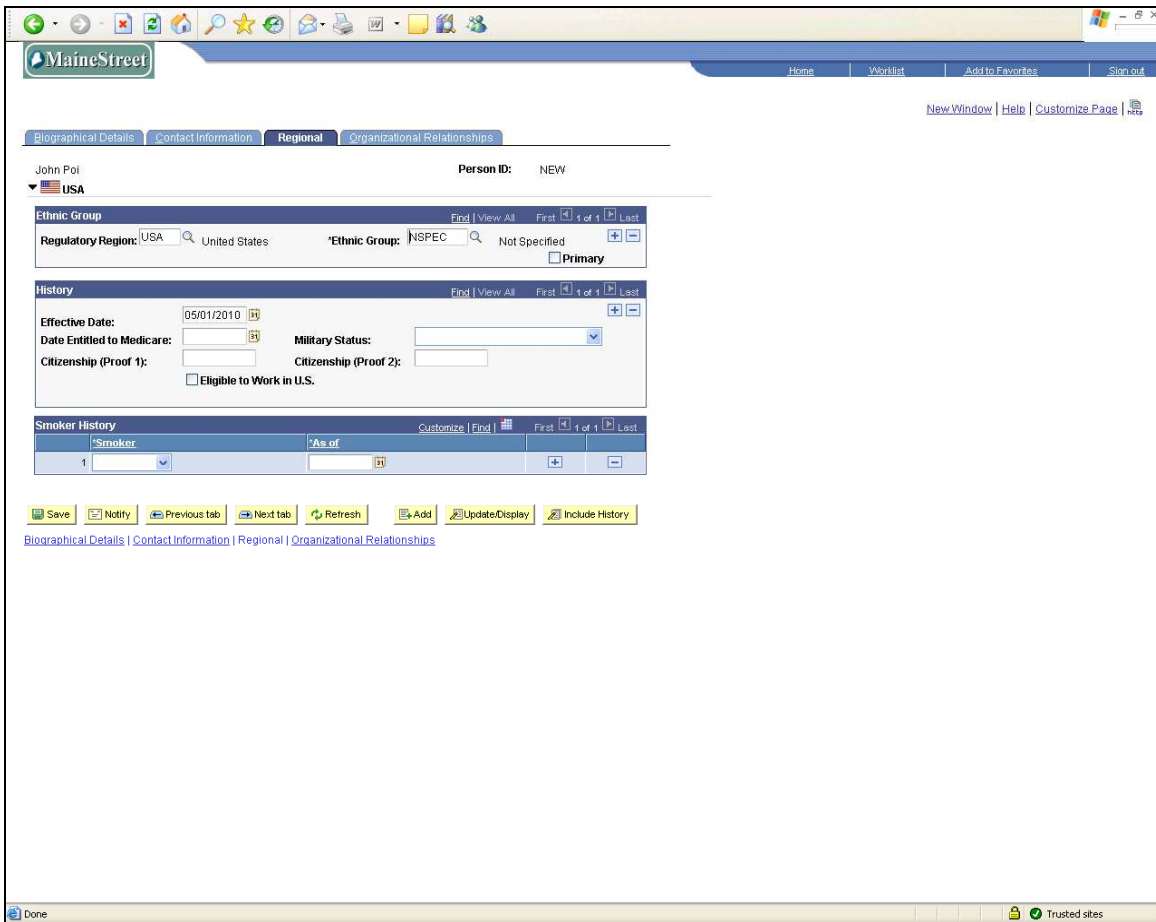
27.	Click the Look up Ethnic Group button.
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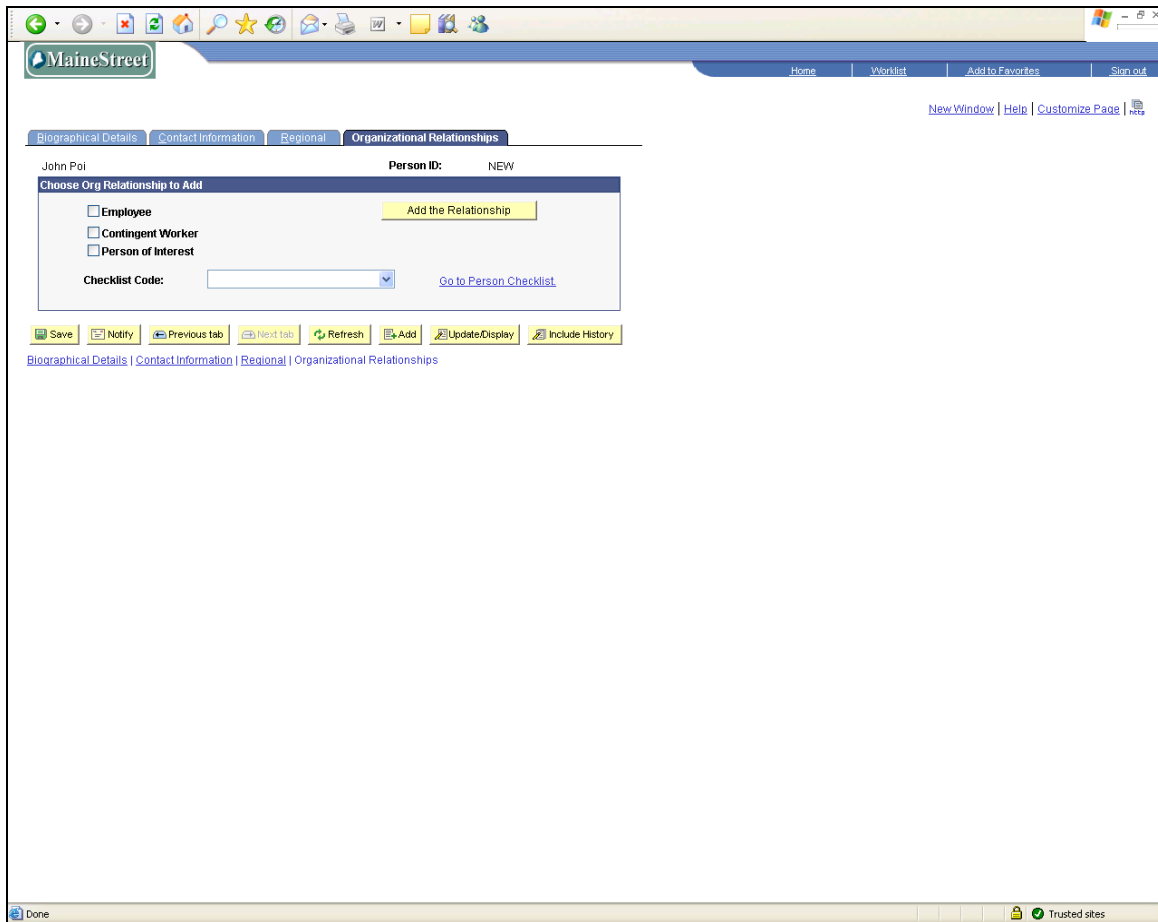
28.	Click an entry in the Ethnic Group column.
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INSPEC

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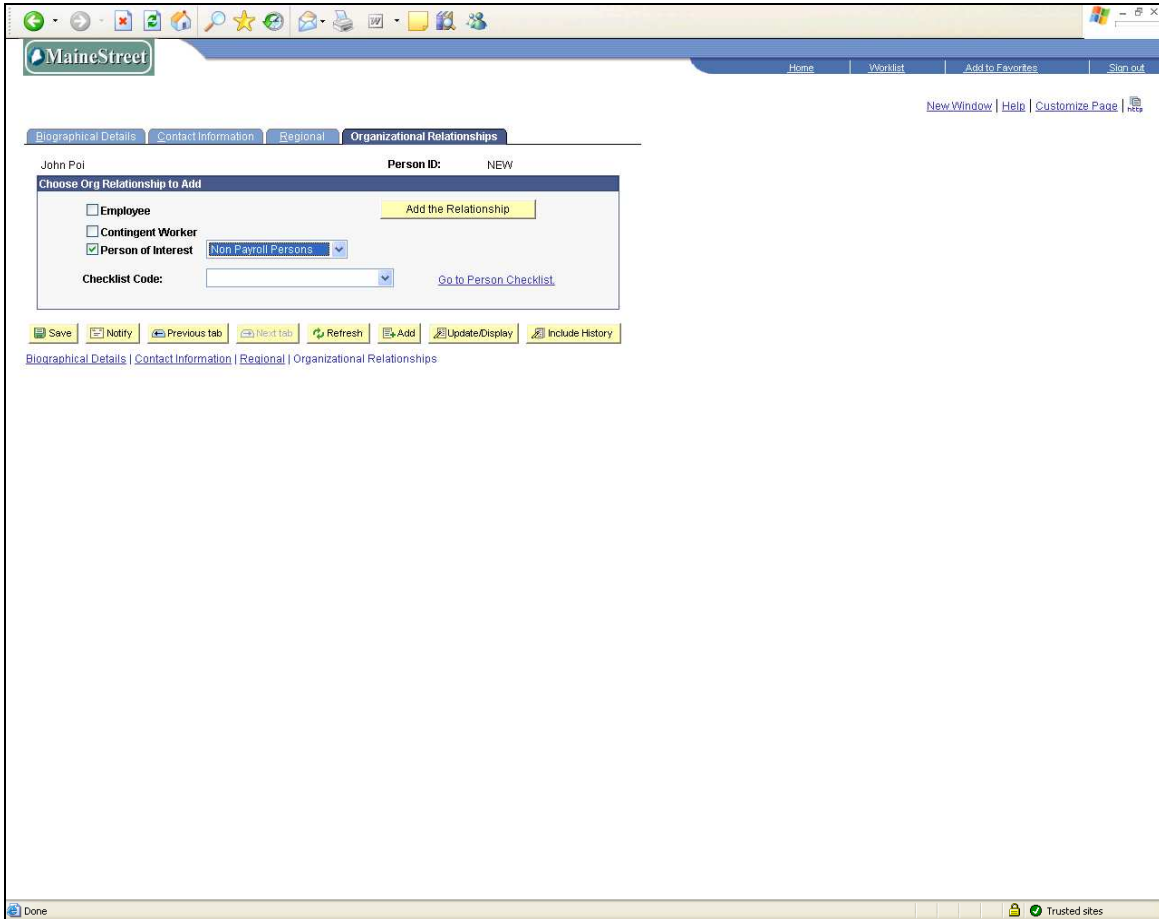
- | Step | Action |
|------|-------------------------------------------------------------------------------------------------------------------------------------------|
| 29. | Click the Organizational Relationships tab.
 |



- | Step | Action |
|------|----------------------------------------------------------------------------------------------------------|
| 30. | Click the Person of Interest option.
<input type="checkbox"/> |
| 31. | Click the drop-down arrow to select from the Person of Interest list.
<input type="checkbox"/> |
| 32. | Click the Non Payroll Persons list item.
<input type="text" value="Non Payroll Persons"/> |

Process Document

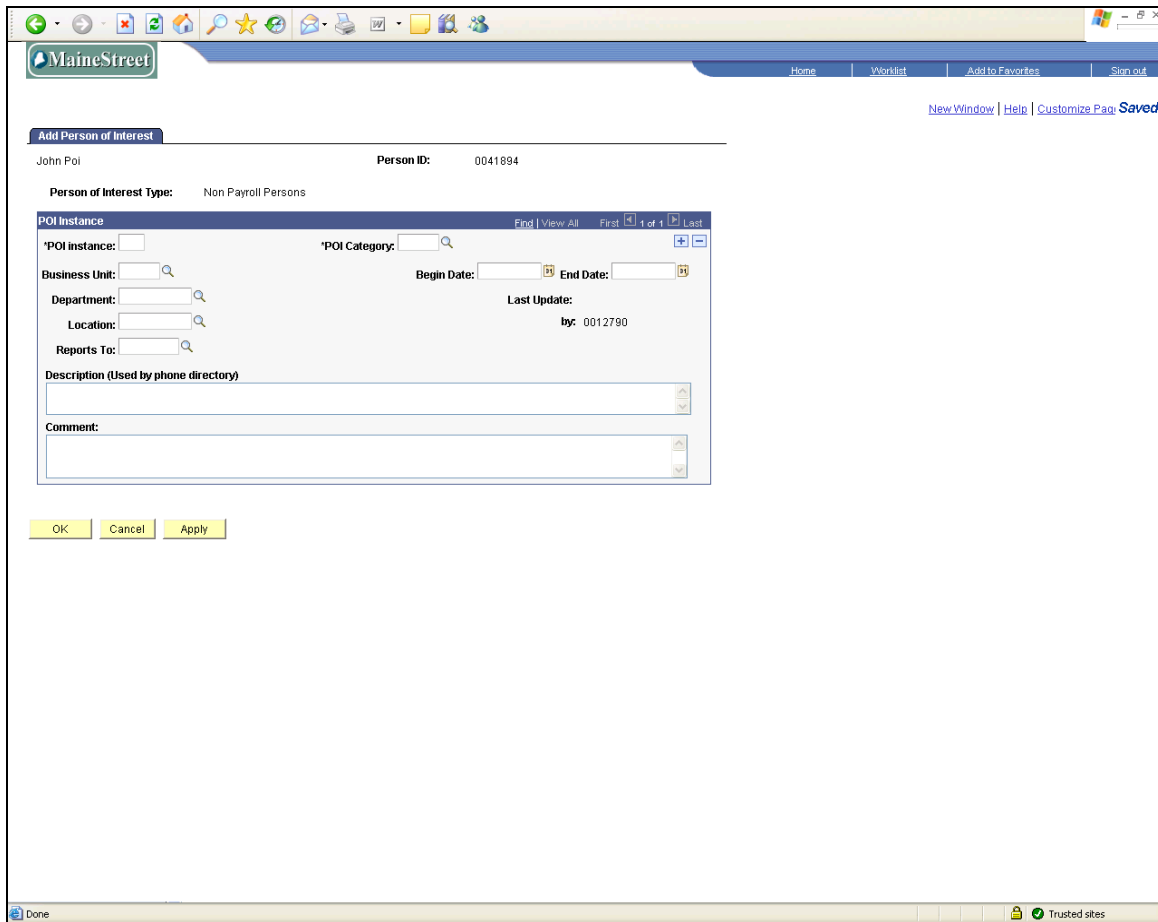
HRMS: Creating a new POI



Step	Action
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33.	Click the Add the Relationship button.
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[New Window](#) | [Help](#) | [Customize Page](#) | [Saved](#)

Add Person of Interest
 John Poi **Person ID:** 0041894
Person of Interest Type: Non Payroll Persons

POI Instance Find | View All First 1 of 1 Last
 *POI Instance: *POI Category: 
 Business Unit:  Begin Date:  End Date: 
 Department:  Last Update: by: 0012790
 Location:  Reports To: 
 Description (Used by phone directory):
 Comment:

Step	Action
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34.	Enter the desired information into the POI instance field.
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35.	Click the Look up POI Category button.
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Look Up POI Category

POI Category: begins with

Look Up Clear Cancel Basic Lookup

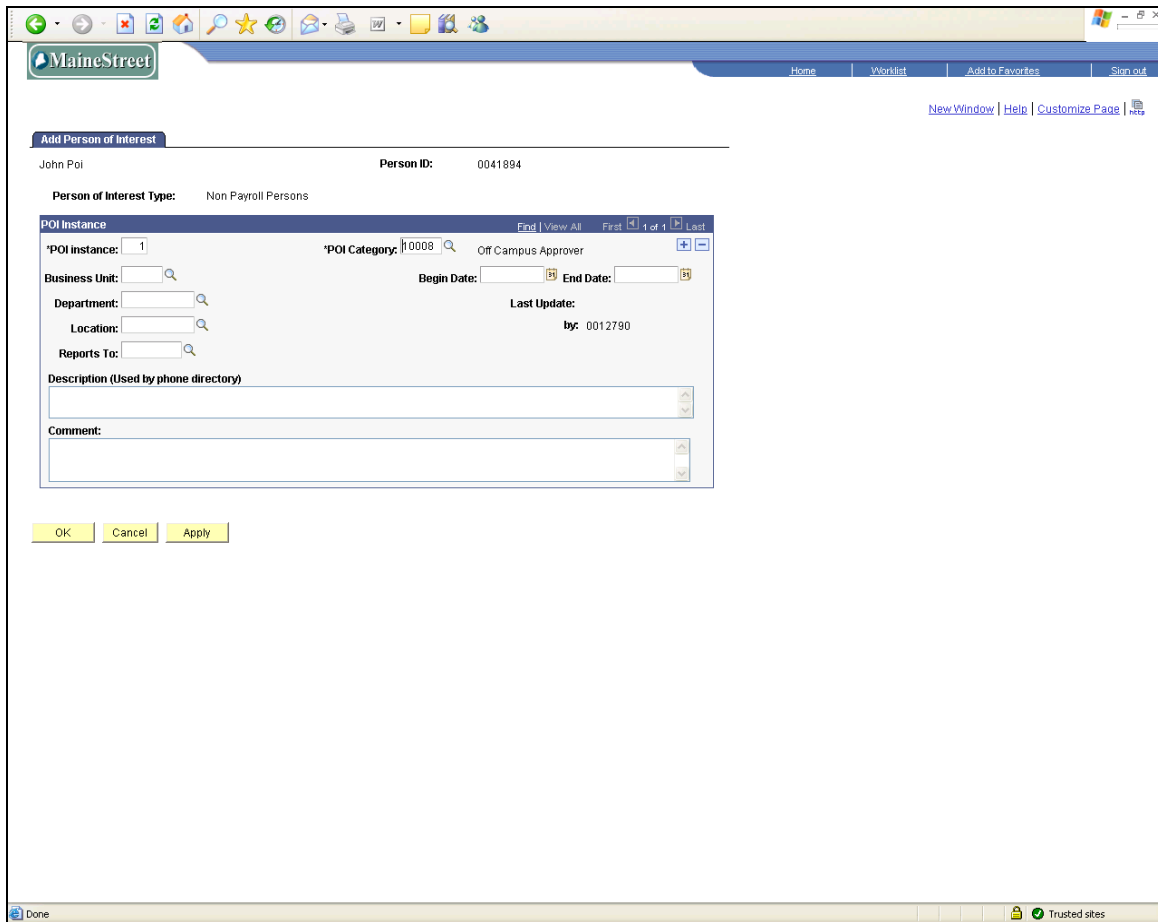
Search Results

POI Category	Short Description	Description
10001	Emeritus	Emeritus Faculty
10002	Visit Fac.	Visiting Faculty
10003	Pre-Hire	Pre-Hire
10004	Consultant	Consultant
10005	Volunteer	Volunteer
10006	Alumni	Alumni
10007	Retiree	Retiree
10008	Approver	Off Campus Approver
10009	Contractor	Contractor
10010	Intern	Intern
10011	Supervisor	Non-Employee Supervisor
10012	Gov. Agent	Government Agency
10013	Health Ctr	Health Center
10014	Asst Coach	Assistant Coach
10015	Recruiter	Admission Recruiter
10016	Grad. Adv.	Graduate Advisor
10017	Military	Military Instructor
10018	Hire Fac.	Pre-Hire Faculty
10019	NonSal Fac	Non-Salaried Faculty

Step	Action
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36.	Click an entry in the Description column.
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[Off Campus Approver](#)



Step	Action
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37.	Click the Look up Business Unit button.
-----	------------------------------------------------



38.	Click an entry in the Description column.
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[University of Maine Farmington](#)

39.	Enter the desired information into the Begin Date field. (Optional)
-----	----------------------------------------------------------------------------

40.	Enter the desired information into the End Date field. (Optional)
-----	--------------------------------------------------------------------------

41.	Click the Look up Department button. (Optional)
-----	-----------------------------------------------------------



42.	Enter the desired information into the Department field.
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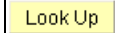

43.	Click an entry in the Description column.
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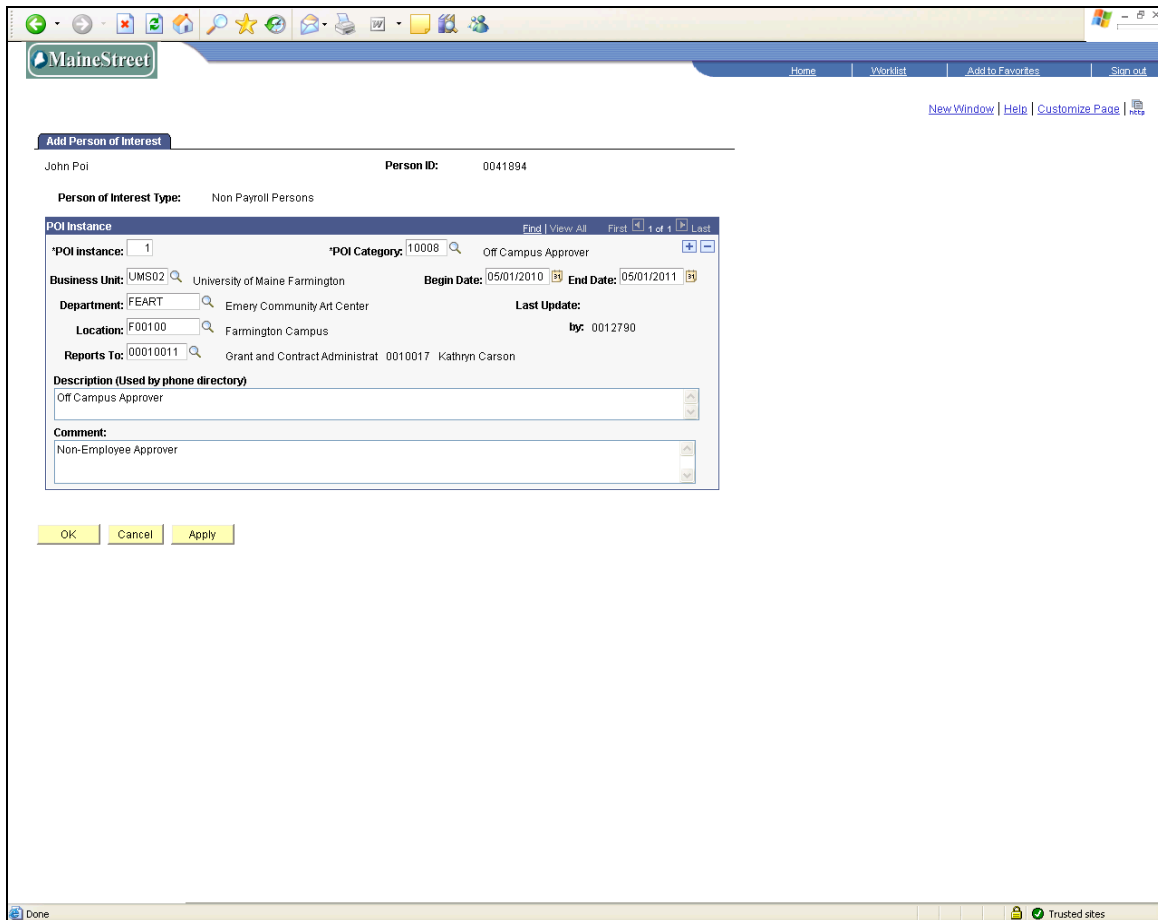
[Emery Community Art Center](#)

Process Document

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Step	Action
44.	Click the Look up Location button. (Optional) 
45.	Enter the desired information into the Location Code field.
46.	Click the Look Up button. 
47.	Click an entry in the Description column. 
48.	Enter the desired information into the Reports To field. NOTE: Optional field that will allow supervisor to see POI information on Manager Self-Service panels.
49.	Enter the desired information into the Description (Used by phone directory) field. (Optional)
50.	Enter the desired information into the Comment field. (Optional)



Add Person of Interest

John Poi **Person ID:** 0041894

Person of Interest Type: Non Payroll Persons

POI Instance: 1 **POI Category:** 10008 Off Campus Approver

Business Unit: UMSD2 University of Maine Farmington **Begin Date:** 05/01/2010 **End Date:** 05/01/2011

Department: FEART Emery Community Art Center **Last Update:**

Location: F00100 Farmington Campus **by:** 0012790

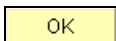
Reports To: 00010011 Grant and Contract Administrat 0010017 Kathryn Carson

Description (Used by phone directory)
Off Campus Approver

Comment:
Non-Employee Approver

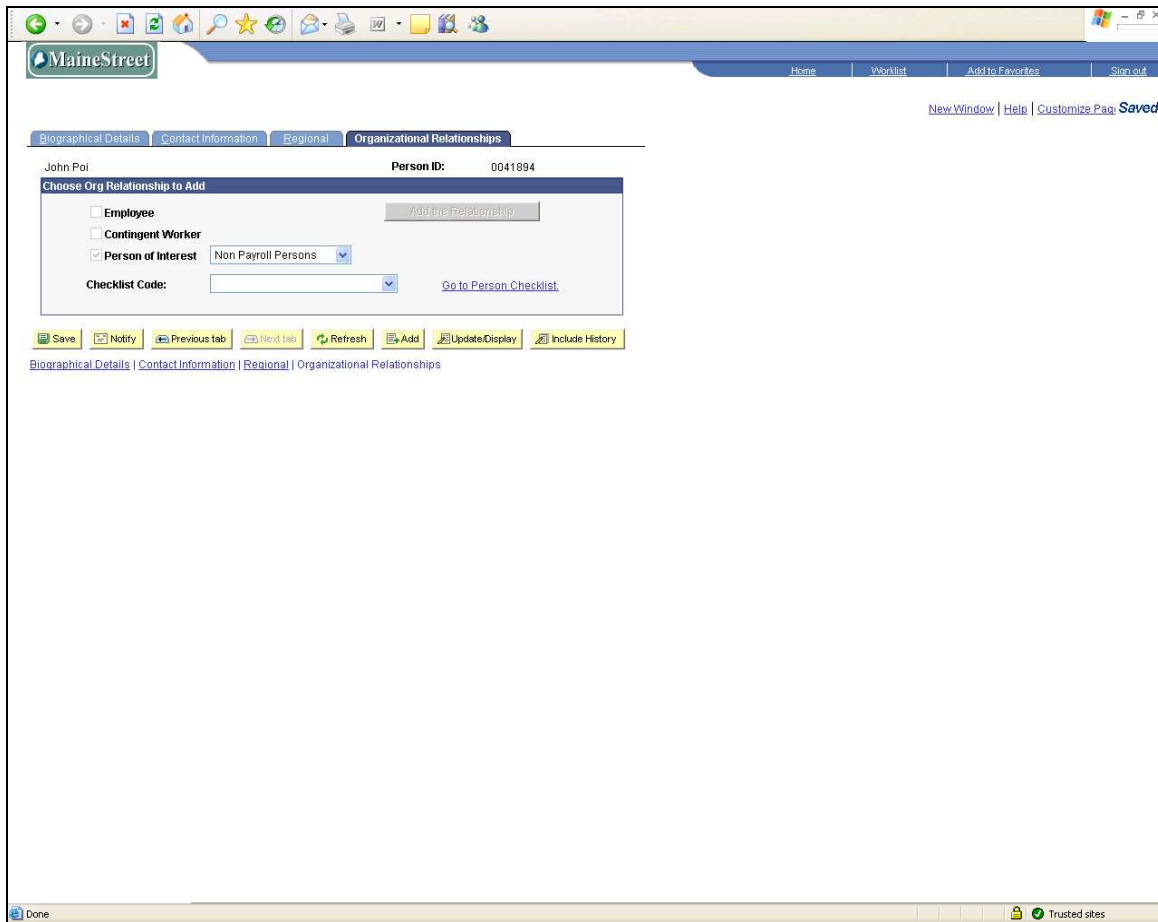
OK Cancel Apply

Step	Action
51.	Click the OK button.



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Step	Action
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52.	Click the Save button.
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NOTE: This process does not create an e-mail address. You must send an e-mail request containing the **Name** and **ID** of the POI to: **operations@maine.edu**.



53.	End of Procedure.
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